EEM

Retention Redefined

8 worksheets for profitable email
and SMS in 2026

WORKSHEET 1:
Retention Reality Check

Score each area from 0 to 5.
0 means it doesn't exist yet.
5 means it's dialed in and performing well.

Area	0	1	2	3	4	5
Welcome Flow	○	○	○	○	○	○
Browse + Cart Abandonment	○	○	○	○	○	○
Post-Purchase / Onboarding	○	○	○	○	○	○
Second Purchase Messaging	○	○	○	○	○	○
Replenishment / Repeat Trigger	○	○	○	○	○	○
Winback / Churn Prevention	○	○	○	○	○	○
VIP / Loyalty	○	○	○	○	○	○
SMS Strategy (not just promos)	○	○	○	○	○	○

Total Score: _____ /40

Top Priority to Fix First:

WORKSHEET 2:
Lifecycle Message Map

Define what your customer needs at each stage and the best channel to deliver it.

Stage	What they need	Best channel	Core Message Theme	CTA
Aware	_____	Email / SMS / Both	_____	_____
Interested	_____	Email / SMS / Both	_____	_____
First Purchase	_____	Email / SMS / Both	_____	_____
Onboarding	_____	Email / SMS / Both	_____	_____
Second Purchase Trigger	_____	Email / SMS / Both	_____	_____
Habit / Loyalty	_____	Email / SMS / Both	_____	_____
Winback	_____	Email / SMS / Both	_____	_____

Notes:

WORKSHEET 3:
Segmentation Builder

Select the segments that matter most and define how messaging changes.

Segment	Definition	How Messaging Changes
First-Time Buyers	_____	_____
Repeat Buyers	_____	_____
VIP Customers	_____	_____
At-Risk / Churned	_____	_____
SMS Subscribers	_____	_____
High AOV / Category Interest	_____	_____

One segmentation improvement to make this month:

_____

_____

WORKSHEET 4:
Email + SMS Pairing Planner

Decide which channel to use and why.

ECOM EMAIL MARKETER

Campaign or Scenario	Email?	SMS?	Why This Mix Makes Sense
Welcome	Yes / No	Yes / No	_____
Abandonment	Yes / No	Yes / No	_____
Product Launch	Yes / No	Yes / No	_____
Sale or Urgency	Yes / No	Yes / No	_____
Subscription / Replenishment	Yes / No	Yes / No	_____
VIP Access	Yes / No	Yes / No	_____
Winback	Yes / No	Yes / No	_____

Notes:

_____

_____

WORKSHEET 5:
AI Integration Planner

Define where AI supports your workflow and where the human touch is needed.

Task Type	AI Role	Human Role
Brainstorming / Ideation		
Drafting Messages		
Personalization Based on Data		
Segment Testing and Optimization		
Send Timing Optimization		
Tone / Humor / Emotional Voice		

One new way you will use AI this quarter:

WORKSHEET 6:
Flow Build Tracker

Track which lifecycle flows are complete and which need improvements.

Flow	Built?	Needs Rewrite?	SMS Added?	Testing Live?	Impact Level
Welcome	Yes / No	Yes / No	Yes / No	Yes / No	Low / Mid / High
Browse Abandonment	Yes / No	Yes / No	Yes / No	Yes / No	Low / Mid / High
Cart Abandonment	Yes / No	Yes / No	Yes / No	Yes / No	Low / Mid / High
Post-Purchase	Yes / No	Yes / No	Yes / No	Yes / No	Low / Mid / High
Second Purchase	Yes / No	Yes / No	Yes / No	Yes / No	Low / Mid / High
Replenishment	Yes / No	Yes / No	Yes / No	Yes / No	Low / Mid / High
VIP Messaging	Yes / No	Yes / No	Yes / No	Yes / No	Low / Mid / High
Winback	Yes / No	Yes / No	Yes / No	Yes / No	Low / Mid / High

Next flow to build or optimize:

WORKSHEET 7:
Brand Tone and Personalization Guide

Define how your messaging should sound, especially in SMS.

Tone Feels More:

☐ Friendly

☐ Casual

☐ Direct

☐ Warm

☐ Playful

☐ Supportive

☐ Educational

☐ Dry Humor

Words or phrases we use:

Words or phrases we avoid:

Rewrite this message in your tone:

Original:

"Your order has shipped."

Your version:

WORKSHEET 8:
KPI Scorecard

Measure the metrics that actually matter for long-term retention.

Metric	Current	Target	Notes
Repeat Purchase Rate	_____	_____	_____
Time to Second Purchase	_____	_____	_____
Subscription Performance	_____	_____	_____
Active Engaged Subscribers	_____	_____	_____
Flow Revenue Percentage	_____	_____	_____
AOV	_____	_____	_____
Unsubscribe Rate	_____	_____	_____
LTV (90 or 180 Day)	_____	_____	_____

Biggest takeaway after reviewing data:

_____

_____